

Exhibit I

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BidSwitch

Product Proposals : 2-YR Forward Planning

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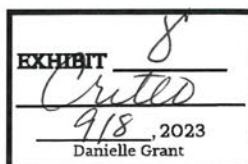
1. EXEC SUMMARY

For numerous reasons¹ investment in BidSwitch as a Product (loosely defined as "the suite of services that SSPs and DSPs use") has been relatively minimal over the past several years. Many new features have been released to support the historically core functionality of BSW², but aside from [Deals Centre](#), which is still in validation and is largely an "extension" of BSW's existing model, no major product innovations have been undertaken. This has been the case despite consistent robust growth from BSW as a source of gross demand spend and net revenues.

Given the ongoing success and growth of BSW, the changes taking place in the market as outlined below, and the potential acquisition by Criteo, there is opportunity to evaluate new areas of investment in the Product, to entrench us more deeply with existing clients and to reach new client segments and service types with the aim of putting BSW on stronger footing to address these tectonic change.

¹ Some of the reasons as follows: 1) Investment was diverted to the development of new products and services under incubation, 2) Historically, custom was relatively stable and higher margin, 3) BSW was seen as a "cash cow" to generate revenues for new growth products, 4) BSW model was perceived as under threat for various reasons, 5) as a product, BSW has generally been regarded by engineers as less exciting than other projects.

² Here "core functionality" refers to functions and features to enable higher trading volumes and stickiness of BSW as being a passthrough between SSPs and DSPs.



The primary purpose of this document is to directionally outline several Product investment options. The end-in-mind is for IOW leaderships to then collectively agree on one or more approaches, which will then require further detailed analysis and validation.

This document will provide a high-level overview of four Product concepts for BSW/IOW. For each concept, context and rationale is included, followed by a high-level description of the Product Concept, the problem or issue it seeks to address, and a rough outline of the estimated Opportunity (\$) and Effort (dev time). Lastly, we touch on synergies with Criteo, a factor which may strongly influence our ultimate decision on which path(s) to follow.

Broadly speaking, the first two concepts (Standalone Deals Marketplace & Fortress Switch) represent "expansions" of the existing BSW model into new client segments and a close tie-in with GRID. The second two represent "extensions" of the existing BSW model into the same client segments but in new ways.

2. BIDSWITCH - BACKGROUND, CURRENT STATE & ONGOING RELEVANCE

Background

BidSwitch was launched during a period of extraordinary expansion in the programmatic space - new DSPs and SSPs were proliferating and scaling rapidly, creating a strong need for a solution that provided access / connectivity and standardization, as well as optimization.

When privacy (GDPR) and quality (ads.txt) concerns came to a head in 2018, consolidation with the largest buyers accelerated.

Trading Trends (see below)

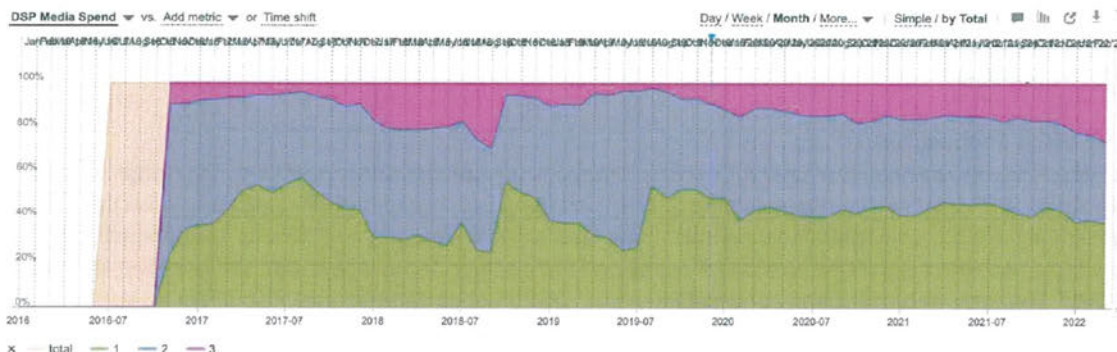
- 2016 (and previous years) shows strong growth (see below), buoyed by the ongoing proliferation of programmatic platforms.
- In 2018, GDPR and ads.txt have a negative impact on trading, an impact that becomes a driver for consolidation.
- Since mid 2019 we've seen a strong growth trend (minus a brief dip mid 2020) with spend consolidating with the largest buyers.



Trading Pair Trends (see below):

- Demand - In 2016, Google represented only 24% of trading, whereas in 2022 they represent roughly 40%.

- Also In 2016, 3 of the top 10 buyers were IOW platforms (P161, EMX, Diligent), but only 1 IOW SSP (Kargo) was in the top 10.
- Supply - In 2016, 5 of the top 10 supply partners were Tier 1 (Rubicon, Google, OpenX, AOL, Cox)



Inventory Type

Since 2016, App traffic has grown rapidly, from 18% of total traffic in 2016 to 39% in 2022, more than 2X growth over 5 years. Web traffic, in comparison, decreased as a % of trading from 82% in 2016 to 61% in 2021.

Deals Trading

In 2016, 93% of all BSW trading was Open Exchange, with only 2% for PMP trading and 5% for open or evergreen deals. Fast forwarding to 2021, 58% of trading is Open Exchange with 9% for PMP and 33% for open deals, so there's been very clear and persistent growth in this area.

Summary

Trading trends on BSW over the past 5 years have largely been a reflection of broader trends across the industry: a gradual move from web display towards app and new formats, the growth of PMP trading, a much stronger reliance on trading from T1 DSPs on longer tail SSPs

Current State & Value Propositions

BidSwitch has become efficient at performing several *closely interrelated* functions that are highly valued by many of the largest players in the market;

1. Infrastructure Cost Savings

Smart Switch (and to a lesser extent True Price / OPD) allows clients to optimize their infrastructure / HW budgets and focus resources and attention on strategic priorities. This is especially true for DSPs with any budget-driven QPS constraints. Importantly, our technology allows DSPs the ability to drastically reduce listening costs whilst still maintaining performance.

2. Operational Efficiencies

Closely related to 1 above, we provide clients access to multiple partners from the same integration, and the ability to outsource the "management" of those partners to BSW, including many technical, tedious or otherwise undesirable tasks associated with programmatic trading, including: Billing and Collections, Discrepancy Management, IVT clawbacks and the "downstreaming" of DSP requirements for trading

3. Standards adoption and proliferation:

From the latest oRTB spec, to ads.txt, Sellers JSON, Buyers JSON, GDPR compliance, SDA

(Seller Defined Audiences), etc, BidSwitch is typically at the forefront of adoption or driving the adoption of new standards and protocols in the industry. This gives large buyers a) comfort that they have a partner who is reliably ahead of the curve on these topics, b) the ability to lean on BSW for testing or faster adoption while they develop their own capabilities.

4. Onboarding / Testing

Many large DSPs (DV360, MediaMath, Yahoo, Amazon DSP) will insist that new supply-side integrations take place initially through BSW. This is especially true for the exploration of new formats.

Key Value Proposition

BSW effectively replaces the need for direct integrations for *non strategic*³ partners. To a large extent, we act as an “proxy” or representative for DSPs; managing lower-priority SSP relationships on their behalf whilst they focus on other strategic priorities. Our fees are low enough that DSPs can understand the cost savings associated with Hardware and People, and the ability to focus elsewhere. We are “The Tylenol of DSPs”. Regardless of this clearly understood value, DSPs will continue to establish direct SSP connections when pressured to do so by their agency buyers. Preventing this might be considered the “hard problem” of BSW.

“The Hard Problem”

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³ Defined loosely as being deemed important by the DSP themselves, or very often due to pressure from agencies to establish direct connections.

The predominant trends that will shape our industry in the coming ~3 years remain the following:

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	well. I think realistically the industry has until the end of the year at best to get sorted out before impactful action starts occurring.	<p>securely.</p> <p>H. Increased demand for “measurement solutions” that can operate in the absence of cookies.</p> <p>I. Reluctance on the part of large content owners (gaming, retail media) to allow user data to “leak” into other environments.</p>
2	<p>Consolidation</p> <p>The growth of the largest walled gardens (Google, Amazon, FB, Microsoft, and soon Apple) is expected to continue, assuming these players are able to navigate antitrust concerns. Emergence of new walled gardens; M&A has been extremely aggressive with mid-size players (Magnite, TripleLift, Digital Turbine, etc) seeking to become large players</p>	<p>A. Underscores the need to embed deeply with the largest consolidators, including the need to adapt to and for their trading requirements.</p> <p>B. Underscores the need to be sufficiently “scaled” in order to remain indispensable in the market.</p> <p>C. As the largest Advertisers leverage the largest walled gardens more, it will become increasingly difficult for those largest walled gardens to service these advertisers' needs while avoiding legal issues around oligopoly</p> <p>D. More M&A activity, driven by the need for large players to innovate and adopt faster than by organic means..</p>
3	<p>Changing & Emerging Formats</p> <p>Linear TV, though still massive in terms of ad spend, is rapidly losing ground to CTV. Supply and Demand partners are aggressively pushing into this space as new targeting and measurement capabilities slowly begin to emerge. This has also leads to an emergence of programmatic linear TV. DOOH was negatively impacted by COVID but with the worst of the pandemic seemingly lifting, growth has already begun and is expected to increase in pace and scale. Audio is still fairly fledgling and niche but has seen growth in the last 2 years.</p>	<p>A. Slow but steady decline in Web Display, accelerated by cookie deprecation in 2023. This represents ~60% of trading on BSW today across desktop and mobile.</p> <p>B. The need for addressable targeting and measurement solutions that can scale across multiple trading partners in non-Web environments (CTV, DOOH, Audio, VR, etc).</p> <p>C. New methods of integration/points of access for emerging formats inventory and the need for standardization of programmatic trading across them. This is addressed more directly below in proposals 3 and 4 and many of the contingency plans.</p>
4	<p>Cooperation-to- Competition</p> <p>As outlined in Jounce's State of the Open Internet 2022 Report, “DSPs and SSPs are moving from partners to competitors. DSPs are building publisher-direct integrations that bypass exchanges. And SSPs are building value-add targeting and ad delivery capabilities that marginalize the role of DSPs.”</p>	<p>A. Many formerly one-sided businesses are forced to become two-sided marketplaces to avoid being squeezed out: TTD and Criteo going direct with Pubs, large SSPs like IndexExchange and PubMatic cutting deals with agencies directly.</p> <p>B. Emphasizes the importance of having direct / owned Supply AND Demand</p>

5. CRITERIA FOR EVALUATING NEW PRODUCT CONCEPTS

In addition to seeking to address as many of the challenges and opportunities outlined above as possible, below are guidelines for use in evaluating the below Product Concepts:

- A. Business Impact** as measured by Revenue Growth, GDS growth, market share or other similar metrics. *Directionally*, a new Product should be plausibly believed capable of generating ~\$15M in incremental net revenues over 24 months, and/or ~\$100M in Gross Demand Spend, measured from the date that a given product is fully "live" (not in beta, etc).
- B. Opens New Revenue Streams** - New forms of billing or revenues are opened from existing clients or from new client segments.
- C. Mitigation against the loss of cookies and / or Device IDs**
As per above, a suitable candidate for selection should in some way help us to address the loss in trading anticipated from the deprecation of cookies and/or mobile IDs. This only represents somewhere between 20-40% of total targeted trading today, even assuming that we are able to stitch together addressable capabilities using multiple "universal IDs", etc. Beyond 3rd party trackers and browser based solutions, many are turning to something they are already familiar with, namely the deal ID. deal ID's now renamed "trust ID" will be leveraged by most of the market at least in the short to mid term to minimize trading impact from the loss of the 3rd party cookie. This enables targeted trading based on Publisher and/or SSP data which is trusted among the trading partners and signaled via the deal ID.
- D. Leverages of Existing IOW Assets and Positioning**
The chosen Product should leverage the assets that BSW has in place around ubiquitous integrations, neutral positioning, billing and payment handling, traffic optimisation, reporting, etc.
- E. Compatibility with Criteo's Commerce Media vision and strategy.**
We should seek to align as closely as possible to Criteo's plans and strategy around the Commerce Media Platform and their omnichannel performance agenda.
- F. Scalable without Criteo**
Given the uncertainty around the Criteo deal at this moment, a suitable candidate for investment should be viable and scalable without Criteo.
- G. Cost and Time to Commercial Scale**
Cost including ERC, HW, legal, etc, as well as the amount of time estimated to achieve significant commercial scale (see A above) are also important considerations. At this early stage the estimates in this doc are extremely rough and directional, requiring a much deeper dive on preferred options.

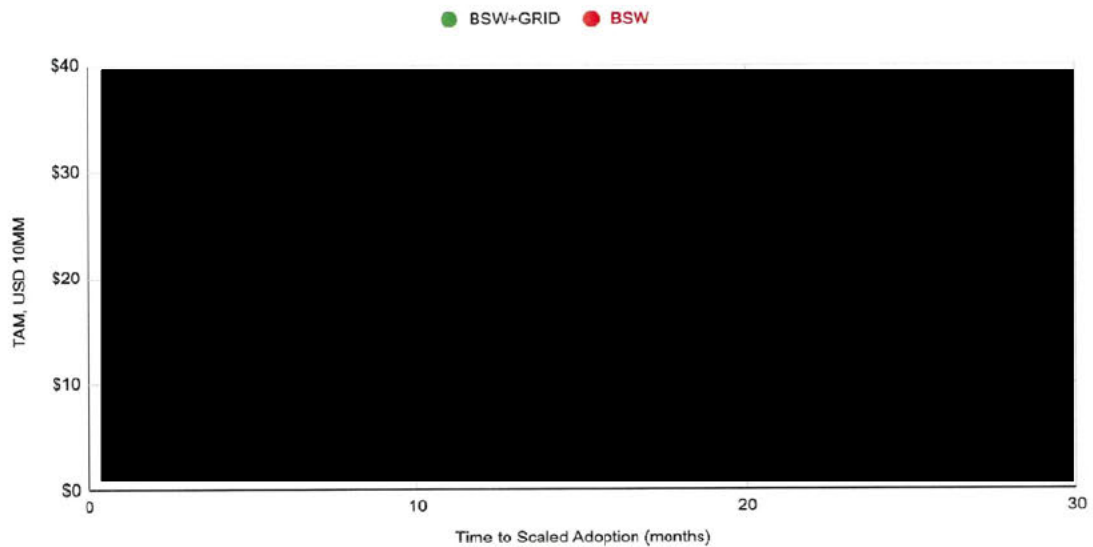
6. FOUR STRATEGIC PRODUCT CONCEPTS

Below is a list of Product Concepts. Whether the Criteo acquisition goes forward is another important factor in evaluating the options.

- 1. Standalone Deals Marketplace:** Primarily a play to move us into premium trading. Supports CTV and emerging channel growth, supports addressable advertising via Trust ID support.
- 2. Fortress Switch:** Supply-side "direct" play; pulling non-programmatic spend into programmatic. Focused on the App and CTV space and supports strong CTV growth. Capturing new entrants to programmatic.

3. **Identity Switch:** Industry-level approach to addressing cookie deprecation, with the potential to drive substantial incremental revenues over time.
4. **Pod Switch:** A wedge into 2 premium formats. Focused on the CTV and Audio space.
5. **Light Switch:** Outsourced SPO
A DSP focused offering that also supports our Identity agenda.

STRATEGIC PRODUCT CONCEPTS OVERVIEW



A. STANDALONE DEALS MARKETPLACE

Problem:

Deals trading makes up a significant portion of total trading and is expected to grow through emerging formats like CTV and the looming death of 3rd party cookies. Despite this, all aspects of deals trading are still highly manual, rife with delays and challenges around scaling, errors, and uncertainty, all which lead to a high probability of non-delivery or failed campaign KPIs.

Importantly, Deals Marketplace is a means of addressing on-going pain points of all players in the industry including Publishers, SSPs, DSPs, agencies and advertisers across a major form of trading which is expected to grow. Deals trading remains a challenge for industry stakeholders in several ways:

- F. **Scale** - Buyers (brands, agencies and DSPs) often struggle to scale Deals targeting sufficiently to meet budget and targeting requirements, in part due to limits in accessing inventory from a unified source of supply. IOW's Marketplace would provide the ability for a campaign to run from a single DSP of choice, across multiple SSPs, eliminating the need to cut campaigns in pieces or run ad ops to fill gaps that are left by single SSPs.

- G. Operational Efficiency - A large portion of deals trading remains quite manual and rife with delays and errors, and media planning is difficult in the absence of forecasting tools that can operate across a wide portion of the supply landscape.
- H. Cost and Waste Reduction - Agencies, SSPs and Publishers overspend on headcount needed to set up, manage and optimize deals, with huge volumes of deals that are either never utilized, or which soon populate "zombie graveyards".

Background

Early plans to develop a Deals Marketplace began in 2016-17 with the emergent growth of PMPs. Later in 2018, [Deals Management Console](#) was also developed to help agencies manage deals workflow and investments. BSW proposed a set of requirements beginning with [Deals Troubleshooting](#). The concept remained in view for the remaining years, most recently in 2021 under the MSP Group.

Past Learnings - Deals Management Console for Agencies

Beginning with Publiis in APAC, [Deals Management Console](#) represented our initial product and commercial foray into what later became The Media Grid. The purpose of this system was to help agencies in APAC manage deals holistically across trading partners and platforms. The original design was an evolution of the Bid Enrichment Engine, sitting atop BidSwitch, ingesting deals data from connected SSPs and enabling reporting/forecasting against and repackaging of those deals for activation in any connected DSP. The project stalled in APAC due to issues getting Grid ads.txt on SSP publisher domains. When brought to the US and EU markets, the concept was attractive to agencies, but failed to gain traction in its current architecture. Namely, the Grid workflow at the time (sourcing supply from SSPs) represented another "hop" and fee in the supply chain, which agencies said would be untenable to their brand clients. Their advice to us at the time was to cut out at least one existing hop/fee taker - and their recommendation was the SSP. This guidance is what eventually led us to start integrating pubs directly into Grid infrastructure and converting what was originally just a deals management repository/hub into a full-fledged SSP. Also, in bringing the deals console concept to NA and EU markets, deals management was not stated as a primary concern or pain point for those agency holdcos. Instead, the focus was on holistic investment management, supply management/marketplace development, and proprietary value prop creation (via things like 1P data science activation, impression scoring, etc). Margin extraction was a theme in all markets, expectedly.

Largely due to the size and commitment of the undertaking and a lack of robust business case validation, together with the inability to scale Deals Management Console, we chose not to pursue development of a Deals Marketplace offering, and instead put fewer resources on executing more tactical initiatives related to PMP trading. This included Deals Management; [Deals API for Buyers](#), [Deals API for Suppliers](#), [Deals API Targeting](#), and Deals Reporting.

Market Context

Today, it's estimated that [51%](#) of total programmatic spend is PMP based. High value inventory (\$20CPM+), especially among the attractive emerging format space, is almost all PMP based.

For BidSwitch today, only ~20% of trading is PMP-based, putting us below half of the industry average and effectively keeping us "locked out" of the highest value inventory and keeping us more dependent on formats that are losing market share (desktop and mobile display). Information on adoption of the Deals Sync tool is [here](#) (data from Jan 2022).

Many SSP specific external facing marketplaces, like Magnite's, have been sunset. The marketplace is now a way to quickly access audiences and package inventory for internal use by account management

teams. This shift was lead by lack of adoption/integration/scale, and as an internal tool helps drive significant deals trading.

High Level Product Description

We are proposing a Standalone Deals Marketplace that is not merely an extension of BSW or GRID, but which is itself a **new entity** - mostly likely branded independently from BidSwitch or GRID, though powered by both.

Primary Use Cases:

1. Media Planning & Trading & Set-up* - DSPs

Trading would take place via the existing BSW endpoint but via a new UI. A DSP could access it through a redirect in BSW UI or logging in directly to a "Deals Marketplace UI" where discovery, planning and forecasting would take place. If a DSP does not leverage the new UI, they will need to do an API integration. If a DSP has a direct connection with an SSP they will be limited to the insight features (Discovery, transparency, forecasting) the automated set-up and trading activation/reporting would not be available, this they would have to do through their normal (presumably manual) workflow specific to their individual direct connections. Even in this capacity they will have the option for UI or API usage. In this latter option they would pay a fee based on volume of usage and a monthly minimum, the former usage wouldn't come with a specialized fee only a minimum and only if deals trading increases aren't met.

2. Media Planning Only - Agencies and Brands

Agencies and Brands would log into the Deals Marketplace UI to plan buying, then execute via their DSP of choice. If the DSP isn't using the system directly this will make the rest of the process more manual but still viable for both direct connection and trading through BSW. Also if Agencies/Brands start using this for planning it will likely encourage hold-out DSPs to adopt it as well for an optimized workflow.

3. Trading Only - SSPs

SSPs would see the benefit of increased deals trading letting them monetize their audience insights and inventory at a premium.

A standalone IOW deals marketplace would act as a centralized hub where deals can be surfaced for buyers at any level (DSPs, Agencies, and even advertisers directly) to discover, investigate, forecast, and execute trading against the available trust IDs from suppliers.

The Marketplace would be powered by APIs to make integration into planning/buying tools seamless where applicable, but would also have a UI component for those who do not currently have an optimized system for this workflow to interact and execute trading.

The product would allow for transparency into the deals with regards to inventory, and user information and would enable a consolidated access point for suppliers to surface their deals and buyers to access them. It would also enable SPO by reducing duplication of publisher information that doesn't have trusted user targeting enabled on it, and would provide an optimized workflow through the automated execution of deals set-up and trading activation. Likewise, the product would offer reporting (both stand alone and ported in from suppliers via API) fulfilling the needs of buyers to provide insight and success metrics to advertisers. Likewise, forecasting can be ported into buyers systems via API to allow a data safe way to overlay audience information to ensure maximum accuracy of potential scale. To enable a "universal" access point, BSW's integrations with SSPs and Grid's integrations with publishers will be essential.

Optimization vs Activation

As outlined above, deals trading has grown rapidly for many years, but to date we have not made a large "strategic" investment in the space. Instead, we've edged into the space through initiatives meant to **optimize workflows**. These have been very positively received by clients who have adopted them, and

while it contributes to our stickiness and some growth in deals trading (4X + in 5 years), it hasn't been sufficiently compelling of an offer for partners to lean in more aggressively.

*If we want to unlock increased deals trading we need to focus on **activation** coupled with the optimization of deals. The lack of a uniformed activation component to couple with our Deals Sync is the reason why our spec and sync offering hasn't been made into an IAB-endorsed industry standard so far, and why it is sitting in the backlog for Working Group efforts instead of seeing willingness from others to be involved. Strong activation capabilities would provide sufficient revenue increases to drive adoption forward across most key partners.*

Summary Matrix

Client Segment	Offering Description	Value Proposition(s)	Key Risks
Publisher	A system allowing direct access to buyers to provide transparency into inventory and offer a method for packaging it up into various types of deals for transactions. Ability to surface user data and receive a premium in trading for it. Ability to expand user knowledge across ID solutions. Unified reporting.	Workflow efficiency Higher monetization Complete monetization	Adoption
SSP	A place to surface inventory for discovery and transaction by buyers.	Minimize distribution Minimize "waste deals" Increased deals trading Workflow efficiency	Adoption - without supply to surface/ability to package deals the offering loses value. Likewise the need for reporting to be ported into the system as well as other inventory data for transparency makes scaled adoption a concern.
DSP	Enables better ad-ops to ensure SPO while still maximizing campaign spend to KPI goals ensuring future buyer spend. A single system to enable discovery, and forecasting for direct connections and these benefits plus automated set-up and unified reporting for BSW based trading.	Scale Efficiency	Adoption - TTD has a similar offering today and won't be adopting our solution.
Agency	Insight tool for planning and buy channel optimization where once discovery has occurred forecasting can be ported into their walls for additional "1st party data" overlays for more accurate forecasting in a privacy focused methodology	Media Planning Workflow Efficiency Investment Management	Integration - Agencies are not fast to move, and are concerned about things that can seem competitive to their relationship with Brands.
Brand	Unified pub level reporting for attribution insights and future campaign optimizations	Unified Insights for attribution Workflow	Most applicable to top brand advertisers which we have no relationship currently and are

		efficiency	not staffed to tackle
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Key Benefits:

- Addressability - In the absence of scaled cookie replacement technologies, it's expected that PMP trading will increase between trusted partners who are relatively comfortable sharing data and that can support improved targeting without cookies where applicable, but more importantly can leverage their user insight on the supply side tied to first party cookies and the relationship with the user and inventory to package that knowledge into trusted deals for the buyers.
- New Formats - It also helps unlock new formats like CTV which is done primarily (~70%) through deals; even over time it is unlikely that more than 50% of CTV trading will be done through open auction.
- New Client Segments - It opens up new clientele across Publishers, Agencies, and Brands. Scaling this to become the go-to marketplace in programmatic will require direct tools and access for Publishers, SSPs, DSPs, Agencies and Brands, via APIs and later a UI.
- SPO - Once sufficient adoption on the Supply Side is reached, buyers would have insight into deals existing across the all IOW-accessed inventory and through forecasting, reporting and transparency will be able to make an informed decision on the best path to transact on the desired targeting.
- Insights Important to note, we are not proposing to curate a single deal across several existing deals, only to provide the insight into the deals and allow for trading, through theMediaGRID a buyer can look to create a consolidated curated deal if they desire.

This would be a stand-alone system for anyone not leveraging the API integration and therefore they would not need to have familiarity with BSW's or GRID's UI. Ultimately, over time, a new UI would be required that is neither BSW (brand challenges with agencies) or GRID (limited access to supply).

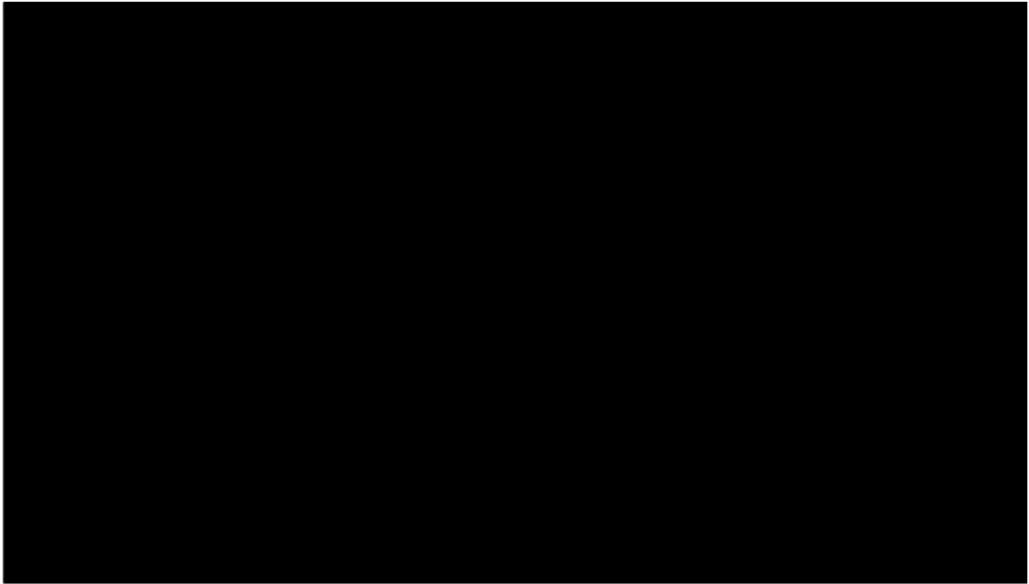
Investment Gaps and Owners

Status	BidSwitch	GRID
Have / Completed	Deals Reporting Deals Sync API Deals Troubleshooting	Curation capabilities
Planned / In Validation	<u>Deals Centre</u> Primarily for SSPs and DSPs to optimize spend on Evergreen Deals Deals Sync Deals QPS	Data marketplace
Need and not planned for development	Deals Forecasting Crawlers and Reporting Block / Allow filtering	GAP

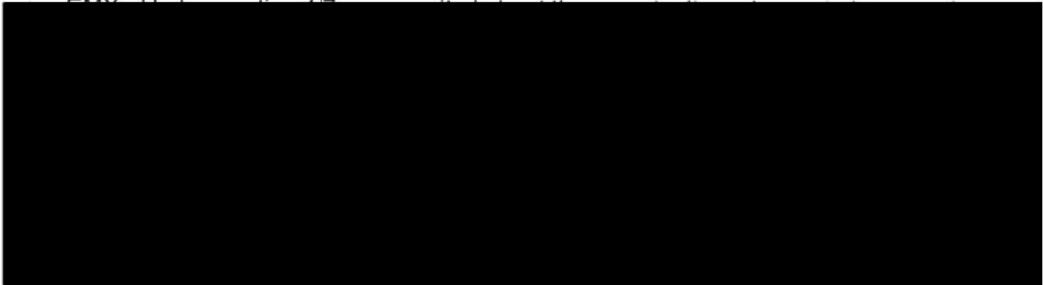
Status of Deals Centre Validation

As of April 25th, 2022, below are some key validation updates:

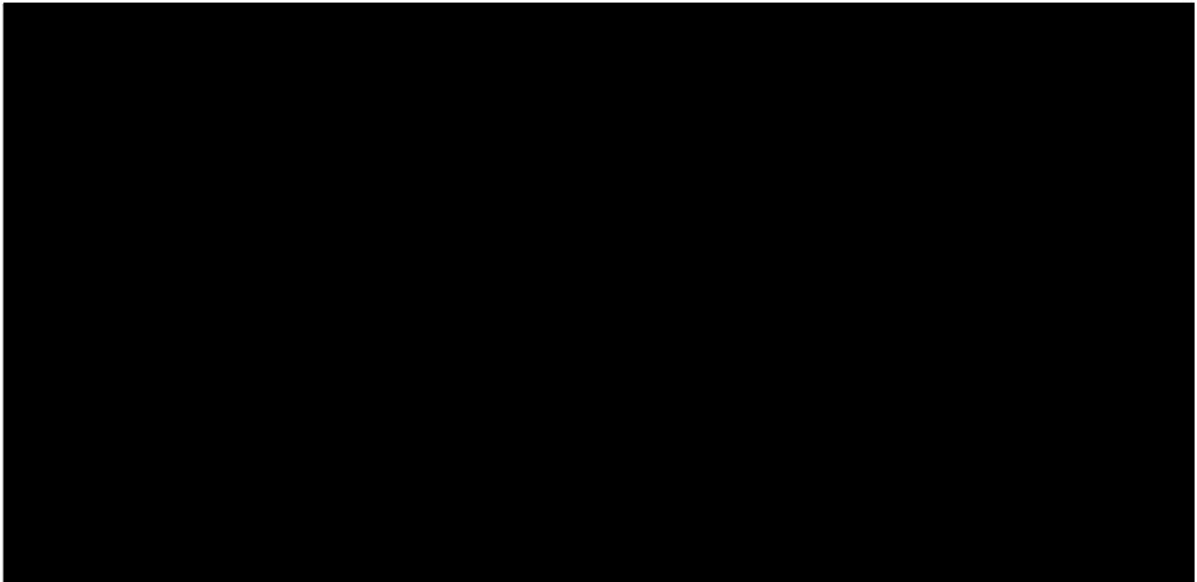
1. DSPs



2. SSPs



Estimated LOE



Addressable TAM

[REDACTED]

[REDACTED]

[REDACTED]

[REDACTED]

[REDACTED]

Target Market Segments

- DSPs - Supports performance and budget management goals for evergreen deals
- SSPs - automated way to surface deals without needing as much manual sales, optimizes distribution to focus on deals that will receive trading
- Publishers - provides additional value to their data and user relationship and ensures highest value monetization
- Agencies - Enables agencies with the ability to manage PMPs from multiple exchanges from a single place. Provides additional insights into inventory when doing planning.
- Brands - provides unified reporting for performance metrics/optimizations, for those who have ability to transact directly this enables a more automated methodology.

High Level Competitive Analysis

Privacy changes, together with SPO efforts, seem to accelerate the growth of solutions in this space.

Below are the most notable ones today:

- Agencies/ Demand marketplaces:
 - **GroupM Premium Marketplace** - announced early this year. Solution is powered by PubMatic and Magnite in different geos. It's supposed to offer "direct and advantaged access" to high-quality publisher inventory and reduce fraud possibilities.
 - **TTD OpenPath** - provides advertisers with direct access to premium inventory, bypassing SSPs so long as the publisher uses Prebid.
 - Xandr Curate - longest in market, among those three. Offers both custom and evergreens from various vendors through their system.
- Many of the largest SSPs have their own marketplaces, like Magnite (differentiate their offering with a devoted marketplace activation team), OpenX, PubMatic, Index Exchange.

Client Segment	Billing / revenue model
Publishers	[REDACTED]
SSPs	[REDACTED]
DSPs	[REDACTED]
Agencies	[REDACTED]
Brands	[REDACTED]

Criteo Synergies

Exposure of this concept has been limited to a small group at Criteo (Todd and Ingmar) but initial feedback has been positive as Criteo faces the challenge of scaling PMP trading which is central to curation for commerce audiences. Additional and more formal validation with Criteo is required as a next step.

Secondary Option - Deals Centre Only

The Deals marketplace is a collaborative proposal across GRID and BSW needing functions from both and engagement across both of their markets to be successful. There is the possibility to enjoy many of the above benefits, though to a lesser extent, if we keep our efforts isolated to BSW only through the Deals Centre initiative, inclusive of enhancements to deals sync and deals troubleshooting but with a focus on deals activation of enriched/evergreen deals among SSPs and DSPs.

If the Criteo acquisition goes forward, our recommendation would be to execute on the Deals Centre (pending validation), and use the positive results from this to justify any future Deals Marketplace development.

B. "CONTENT FORTRESS SWITCH"

Market Context

Companies across a variety of sectors are faced with the need to re-evaluate their business models, revenue streams and marketing strategies. The driving forces behind these are various but common problems and examples are listed below :

- Develop new revenue streams to make use of proprietary data and digital assets (eg Walmart Connect)
- Develop new revenue streams in light of a falling subscription base (eg Netflix)
- Changes to regulations and industry consolidation require differing solutions to continue existing marketing efforts (eg Epic / UbiSoft cross promotion and general UA efforts)

Problem

The key problems leading companies to create their own internal content fortress would be the ability to maintain the security, privacy and integrity of their audiences and assets. This ultimately comes down to a lack of resources and expertise as ad tech has not been "front of mind" within their organizations. There is an opportunity for an independent player to support a secure trading infrastructure for the media and audience assets allowing the Content Fortresses control and edging them towards programmatic, while opening up new desired inventory to buyers programmatically.

Opportunity

The existing content 'fortresses' especially in the mobile App/gaming space are interested in programmatically monetizing their inventory as long as it can stay under their control and as long as they aren't giving away their perceived valuable audience insights to an entity like Google or Applovin. The opportunity exists to solve for this problem by making a gateway into the fortress via an Ad Serving solution which when aligned with our existing products such as (BSW and Bidcore) enables the following solutions:

- Provides ad serving infrastructure for businesses to provide better direct sold ad-funded versions of their sites and apps, and enable programmatic trading.
- Enables businesses to create their own "Ad Networks" that enable them to package unique media and data opportunities to buyers.

- By integrating our ad serving stack across multiple apps and sites and utilizing identifiers such as the IDFV, clients such as game developers can cross-promote their titles within their own content fortress.
- For existing BSW buy-side clients this could provide seamless access into unique supply and data opportunities across a range of media channels including In-app and CTV.
- For existing BSW and SSP clients our clients could use products like bidcore to access our existing supply on BSW / TMG as part of extended audience buys.
- Bring integrated demand and guaranteed fill for the Fortresses inventory in a "publisher" controlled and transparent manner.
- Collapsing the supply chain a bit more between publisher/content fortress and buyers.

While there are added benefits for existing DSPs trading on App/Gaming inventory to have access to new inventory programmatically, which will see an increase in trading, the target market for this offering are the Content Fortresses.

Background & Context

In May 2020, ABG proposed the SDK-based ad server concept for consideration. Since that time the larger market opportunity around [Content Fortresses](#) has become more clear (outlined in part by the [Volga Investment Case](#) for In App Gaming and by the rapid growth of players like MoLoCO, Kayzen and DataSeat) and has accelerated by Apple's ATT. GRID's own Product plans are also more mature and partially aligned with this approach via their "Direct Booking System".

On the App Ad-server side, MoPub has been the main stakeholder historically in the mobile space and Freewheel in CTV. Both have numerous deficiencies regularly highlighted by the current user base, and MoPub, recently acquired by AppLovin, has stopped investment/advancement of their ad-server offering. Additionally there are other established players in the space for CTV like SpringServe and Publica who have leveraged server side integrations (SSAI) as a selling point to gain ground.

We can improve upon existing offerings by delivering normalization of trading across inventory and supporting the latest standards like programmatic up-front buying in the CTV space.

Moreover, with the demand that sits behind BSW integrations, we can offer up a neutral unified auction built into the ad-server for ensuring BSW maintains neutrality, but the auction against the BSW activated programmatic demand will take place in BSW prior to showing up in the ad-server for final decisioning. This functionality being integrated into the ad-server by default in a first/last look scenario (similar to AdX in GAM) enables easier activation and scale out of the box, making it more enticing for Publishers to want to leverage the solution.

High Level Product Description

A Mobile/CTV specific ad-server that directly hooks into programmatic and is optimized for "SPO" which can utilize the unique signals of CTV to leverage stronger value, and where "Demand" is pre-integrated via BSW in an ADX - Campaign Manager like situation.

The recommendation is to build a "light weight" SDK that is easier for publishers to integrate than for traditional display SDKs. If we can leverage the direct booking system PBG is looking to build, which includes decisioning logic. This should still be a lightweight enough solution that publishers may be more open to it.

Enabling optimized header bidding workflow with dynamic line items will make this a more enticing option to ensure maximum revenue for the publisher.

Lastly, if we can assure compatibility with the app that updates and non-aligned updates between their SDKs and our ad-server one does not cause conflict/user experience issues, most publishers should be more open to working with this solution.

Roles of BSW & GRID

BidSwitch

Via our 3P DSP integrations (and potentially Criteo), BSW will bring default demand and guaranteed fill to the publisher integrated into the ad-server, similar to Adx in GAM. When a publisher leverages the SDK ad-server BSW can initialize both a first and last look functionality. Essentially, for any buyer looking to target matching inventory (same content/context, mobile, proper geo, etc) via OA trading, we can generate a bid request and fetch demand,

We could either host an internal auction and provide back a single "winner" for ad-server decisioning to occur, or we can slot multiple responses and let the ad-server do all the decisioning.

We can fetch this when the ad-slot first comes available, and then when any other programmatic demand or I/O based line items are activated, and the ad-server has made a decision, we can do one last fetch for last look and see if we can beat it, if our initial demand didn't win. We can use variable floor and take rates to ensure the higher percentage of win is through BSW demand.

If we act as an intermediary (similar to a HB integration) instead of making a full ad-server then BSW just becomes an enablement channel for that publisher to more directly control their trading.

GRID

Grid's auction functionality and ability to generate bid requests would be needed to ensure the integrated demand could execute and guarantee fill. Likewise, rather than take on publisher sales and ops under BSW, we should look to leverage the GRID team's expertise.

Example(s)

When it's a publisher active on GRID or looking to be active on GRID AND the DSP has GRID as an active trading pair:

- Publisher has the SDK ad-server deployed → the first look/last look function (similar to GAM) is leveraged to fetch programmatic demand to compete on the inventory → GRID functionality is used to assemble the bid request to fetch demand and hold auction → buyer's across BSW with OA trading matching inventory/user criteria will now receive another outlet for their trading → if the buyer wins reporting will show up as GRID for the SSP

When the publisher is not activated on GRID and/or doesn't want to be AND the DSP does not have GRID active as a trading pair:

- Publisher has the SDK ad-server deployed → the first look/last look function (similar to GAM) is leveraged to fetch programmatic demand to compete on the inventory → GRID functionality is used to assemble the bid request to fetch demand and hold auction → buyer's across BSW with OA trading matching inventory/user criteria will now receive another outlet for their trading → if the buyer wins reporting will show up as the pub's ad-server as the "SSP"

Key Benefits

- Works nicely with direct-to-publisher initiatives if we expand to Mobile and/or TV. Also places us in a unique position (similar to google) for the Cookie-less future as we would be embedded with the publishers.
- Key Benefits to Publishers:
 - **Neutrality:** provides ad-serving functionality from a non-competitive partner and brings programmatic trading solution that can be executed by the publisher themselves versus

the SSP lastly, it allows the publisher to more easily work with brands and agencies on inventory access and unified reporting through their DSP of choice

- **Demand Diversity:** For In app publishers in particular our range of DSP partners would provide in app publishers with the potential to get incremental revenue from a broader range of advertisers particularly CPG, Retail, and gaming. This could come from brand spend from agency trading seats on DSPs. Examples of verticals include FMCG, Retail and Automotive
- **Unique demand:** Direct integrations into supply could help us leverage data in a more precise way. (subject to permissions being granted of course) this could open up unique and high yielding demand opportunities should we have access to Criteo data (and to some extent direct In app gaming clients via Volga)
- From an in app perspective this link outlines how we are thinking about building a prospects list for in [app direct integrations](#)

Summary Matrix

Client Segment	Offering Description	Value Proposition	Key Risks
Publisher	<p>Ad serving solution to enable the following:</p> <p>Packaging of media / and or FPD for the buy side</p> <p>Cross promotion of publisher's own products (eg games / content) across their own sites / apps / channels</p> <p>Audience extension opportunities on the buy side if they leverage our buy side assets</p>	<p>Create new revenue streams whilst maintaining privacy and security of assets</p> <p>Leverage BSW to connect into Tier one demand side platforms</p> <p>Allow for cross promotion campaigns across their own portfolio of assets</p> <p>Extend reach with buy side options to allow for audience extension (ie UA campaigns)</p>	<p>Adoption - requires a substantial push / investment from pub commercial teams</p> <p>Publisher may want reassurances around how we operate within strict silios between similar companies</p>
SSP	Some incremental revenues from publishers that also leverage our buy side tech to run extended reach campaigns on BSW SSPs	If direct connections beyond BSW are enabled they would be able to be truly dynamic activated through standard header bidding methods and compete evenly based on campaign pacing and value	Negative backlash as pub relation is diminished
DSP	Access to new programmatic media and audiences opportunities	SPO Unique inventory only available via IOW	Publishers may limit certain DSP's / or specific seats if they belong to competitors

	Fewer hops between DSP and ad server	Unique deals based opportunities only available via IOW	
Agency	Access via trading desk or in house bidder to media and audience based trading opportunities	Privacy focused data forecasting and activation Inventory insight for planning Unique media and data opportunities	
Brand	Bring brands and media owners closer together	Potential to forge closer links with the publisher direct given that there would be fewer hops between Brands DSP and Publisher's ad server (eg easier to work with clean room solutions)	Some brands may want reassurance around how we work in silo to potential brands that we provide content fortress solutions to

Investment Gaps and Owners

Status	BidSwitch	GRID
Have / Delivered	Oslo Node in Volga	Limited direct app inventory
Planned / In Development	TBD	Programmatic Guaranteed and ad-server. OneFootball is an example of content fortress request
Need and not planned for development	First & Last look demand functionality in Ad-server	Holistic ad-server SDK based

Use Cases : Retail & Gaming

It is important to stress that **the CFS solution works across multiple verticals**. Retail media and gaming represent two key verticals of interest to Critreo and IOW; they are also two sectors where the ability to provide solutions that support the creation of content fortresses are most relevant. For Critreo and retail media the CFS could be the logical starting point for a larger walled Garden switch as their connection to brands and agencies could help drive the push for the creation of unique inventory opportunities across different retail brands who have yet to open up their own assets to advertising. For example Use Critreo brand connections to open new inventory opportunities (eg Create a CFS for SuperDrug / Watson's Pharmacy stores that allows for cross promotion opportunities for P&G brands) For Gaming clients the growing consolidation of ad tech vendors (eg AppLovin / Adjust / Mopub) means there is a need for independent ad tech solutions. This is not only for cross promotional purposes within their own properties but also for UA / performance marketing purposes.

- For a cross platform gaming client such as UbiSoft our objective would be to create a platform that enables them to cross promote their games within their own environments and best target

high LTV users. Platforms such as bidcore could also allow for UA and audience extension campaigns into BSW and TMG properties

High Level Commercial Model

Client Segment	Billing / revenue model
Publishers	[REDACTED]
SSPs	[REDACTED]
DSPs	[REDACTED]
Agencies	[REDACTED]
Brands	[REDACTED]

Estimated LOE

[REDACTED]

[REDACTED]

[REDACTED]

[REDACTED]

[REDACTED]

Addressable TAM

Estimating the TAM for this concept is made complicated by the fact that it reaches into more than one market: 1) TAM for companies (Gaming and Retail Media) seeking the “fortress garden” offering to maximize control of their audiences and media assets, 2) CTV buying as we introduce a more attractive CTV offering to publishers (GRID).

1. “Content Fortress” TAM

- This would largely involve gaming and retail media clients, but also potentially players like Netflix.
- From a retail media perspective when speaking to their deal with Walmart TTD cite the shopper marketing TAM to be \$200bn
- Based on AppsFlyer data for the in-app space. App Install ad spend is projected to be \$118bn in 2022 (this includes gaming and non-gaming apps. With adjust estimating around 50% of spending within in app goes the gaming vertical
- We have anecdotal / directional information from prospects like Epic Games, whose original programmatic media spend estimates were **upwards of \$50-100MM/year**.

2. CTV TAM

This is the heavier lift given the strong incumbency of Freewheel and other smaller players like SpringServe, Publica, etc. We nevertheless believe it represents a value prop to GRID CTV publishers that will increase over time as demand grows. In BSW it will also increase trading. We currently don't have sufficient data to size either of these.

High Level Competitive Analysis

Getting this implemented requires custom development or using SaaS model companies like [Hybrid.ai](#), [Kevel](#) offering custom ad server for almost all formats, [AdButler](#), [ClearCode](#) or choosing one of the white-label solutions like [SmartyAds](#), [Danads](#), [DataSeat](#) etc.

From an in-app perspective [Nimbus](#) represents an interesting idea given that their in-app solution is not SDK dependent. They have an impressive demand connectivity and have publishers such as My fitness pal, Weatherbug Shopkick, Wattpad and Tumblr

Criteo Synergies

This has not yet been raised by Criteo but given their clear focus on Retail and Commerce Media, and interest / investment in In-App and to a lesser extent Gaming, the approach seems very aligned with their plans.

C. "IDENTITY SWITCH" - PAF OPERATOR

Problem

As stated at the outset of this paper, the continuing loss of Identity signals due to privacy concerns is and will increasingly hamper the ability to make advertising addressable. This represents up to an 80% decrease in addressable trading across the board for much of the ad-tech supply chain.

The PreBid Org's working group, made up of members including Publishers, SSPs, DSPs, CMPs, and Agencies, with pending endorsement by the DAA (Digital Advertising Alliance) and NAI, has developed [Prebid Addressability Framework \(PAF\)](#) to help address this issue.

A key component of its success is having **centralized operator(s)** which comes with operational overhead and for many ad-tech players minimal benefit over what can be achieved through supporting the [framework](#).

What is the Role of a PAF Operator?

The PAF operator is an entity within the PAF framework who is working with the publisher or their CMP to centrally log users ID's and preferences for usage by other members supporting PAF and to help power the audit logging system. There are two options for how an operator(s) can function; 1. There is a specific sub domain among a shared domain to ensure continuity across operators, or 2. A single main central operator serves as the record of truth working directly with the CMPs and distributing when queried the accurate info to any other operators. This doesn't require a shared domain, though onekey domain is currently allocated for this. It also means that other operators are not in direct relationships with the pub/cmp. In either case, unless there is a clear way through other channels to generate monetization all this poses is an additional operational cost. Given this, there are very few entities looking to take on the responsibility of being an operator. Especially among DSPs and SSPs it's hard to find volunteers as any monetization efforts would seem like favoritism.

Background & Context

BidSwitch is already recognized as a "neutral passthrough" connecting a large portion of the programmatic ecosystem. There is an opportunity to leverage our neutral and highly connected status, as well as our optimized processing to act as the largest / main Operator for PAF.

PAF can support multiple operators, and today the spec allows for this via a shared domain, but the code that has been implemented so far actually functions under a centralized operator as the source of truth for consent and IDs which all/any other operators would leverage to ensure uniformed information.

A key value proposition of the BSW service for the largest buyers in the market is our ability to manage the operational complexity of supporting trading with a large number of mid and longtail SSPs. As an operator we can help facilitate additional addressable trading at scale across ad-tech partners through seeding trading through BSW with PAF IDs

High Level Product Description

BidSwitch is one of a select few entities with the option and endorsement to become a central operator for the PAF solution. At scale this could mean as much as \$1MM a year in HW operational costs. By sitting on the source of truth for PAF user preferences and IDs we can then look to seed bid requests without an identifier but where PAF can be applicable, minimizing the burden on publishers and maximizing trading value/potential for DSPs leveraging PAF as an identity solution for addressable advertising. As a PAF operator we would have to store IDs and user preferences and enable syncing of the data with any other operators. Being the centralized one means all publishers can work directly with us instead of all various potential operators while still being able to reap the trading benefits across any operators.

Summary Matrix

Client Segment	Offering Description	Value Proposition	Key Risks
Publisher	Users have access to the PAF system via the OneKey access point, where they can set preferences and authenticate themselves if desired	Enable maximum monetization of inventory without needing the publisher to maintain bespoke integrations with numerous operators	Very early to speculate, but regulatory changes (note the recent challenge to TCF by Belgian regulators) could completely derail this initiative. It's also not clear that operators will be able to monetize traffic in playing the operator role over time
SSP		Maintain or increase inventory value through addressable targeting post cookie	
DSP		Addressable targeting post cookie without additional operational overhead	
Agency		Audience activation against PAF	

Investment Gaps and Owners

Status	BidSwitch	GRID
Have / Delivered	PAF framework support	PAF framework support
Planned / In Development	Additional PAF framework support	
Need and not planned for development	Operator syncing, storage and validation functionality. ID seeding functionality	PAF specific prebid adapter

High Level Commercial Model

Client Segment	Billing / revenue model
SSPs	[REDACTED]
DSPs	[REDACTED]
Agencies	[REDACTED]

Estimated LOE

[REDACTED]

Addressable TAM

The revenue opportunity is little understood since PAF in its latest iteration is extremely new, looking to launch its POC test by June, but conceptually the idea would be to increase overall GDS volumes through BSW pipes by being the largest processor and thereby, potentially⁴ the largest access point for players seeking addressable audiences in a privacy compliant way on the open internet.

Target Market Segment

Publishers

DSPs

SSPs

High Level Competitive Analysis

At the moment 51 degrees is the only other entity with their hand up to take on this role, and at this point it is solely to see success of the initiative as James Rosewell their CEO is focused on privacy/user empowerment and the maintenance of a fair free open web. This isn't to say they wouldn't find a way to leverage it or monetization but that doesn't seem to be the motive currently. Given the over-head and responsibility most others have remained silent on taking on this function.

Criteo Synergies

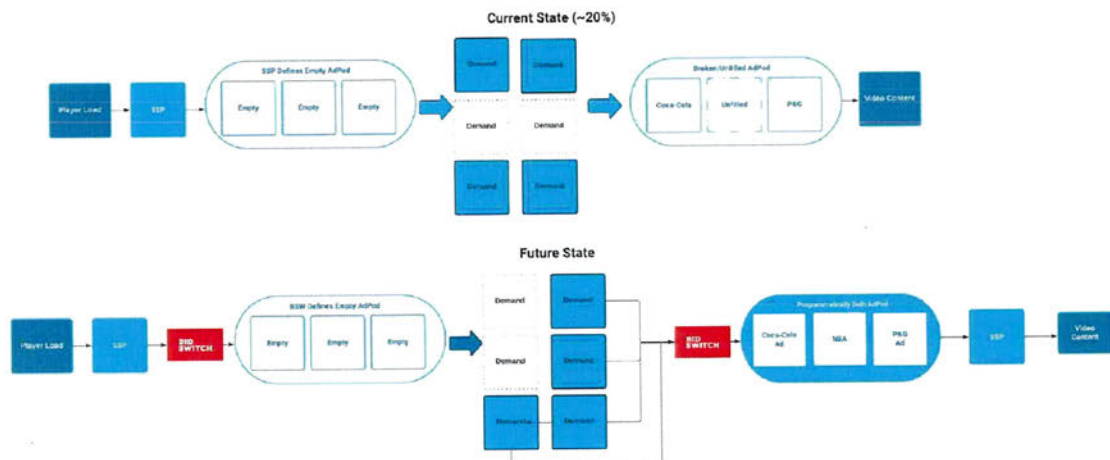
PAF is currently a cornerstone of the future addressable trading infrastructure for Criteo who is a member of the working group and main driving entity to date.

"The DAA certification is an important step in bringing improved transparency and accountability to digital advertising. It ensures marketers and media owners remain free to work with the supply chain partners of their choice, which is core to Criteo's purpose of supporting a fair and open internet," said Todd Parsons, Chief Product Officer at Criteo and Prebid Board Member. *"We're also encouraged to see increasing support for responsible AMIs that better enable marketers and media owners to connect with one another and the consumers they engage."*

D. "POD SWITCH" AD POD PRE-ASSEMBLY**Problem:**

⁴ It's not clear that operators will be able to "monetize" trading when they are also responsible for the processing, but for now it seems plausible

A combination of lack of standards and balancing user experience and ad execution to revenue potential has led to as much as 20% of all CTV Ad-Pod trading being broken and/or incomplete. ORTB 2.6 will help with standardization though adoption will take time, but the lost revenue opportunity is likely to persist.



Background & Context

Ad pods simultaneously bring structure and flexibility to ad breaks within CTV content, enabling advertisers to place multiple ad requests in one bid request, and is now a standard for [ORTB trading in V2.6](#) (7.6 Pod Bidding for Video and Audio) which is expected to scale throughout 2022 and 2023. There are three types of Ad pods;

- Structured pods have a fixed number of ads, all with specific lengths
- Dynamic pods have a fixed duration for the ad break; however, there is flexibility in the number of ad slots and their length
- Hybrid pods, combine portions of structured and dynamic

Among the main benefits Ad pods offer include;

- Improved support for contextual buying and selling by making it easier to signal the various taxonomies (eg - IAB) in the bid request
- Introduction of Network and Channel objects to support CTV inventory description.

The "problem" with this method is timing, assembly, and complete fill. This adds latency and processing on the SSP side and can often lead to a non-fully monetized ad pod being served, missing out on revenue for the publisher and becoming a missed opportunity for buyers who wanted to run there. There is also an adoption speed issue, while ORTB 2.6 is seeing a lot of support by the industry and most players are planning to support it, until both supply and buy side do, everyone will continue to have a hard time transacting on the CTV inventory.

High Level Product Description

The core product functionality is to aggregate multiple bid requests for the same ad pod, or to take a single combined ad-pod request and ensure appropriate distribution to fully fill it, and assemble these requests into a single full ad pod bid response Enable multi bidding on ad-pods for Publishers or SSPs looking to monetize CTV inventory programmatically accomplished through duplicative requests and then assemble a complete ad-pod among the most valuable responses passing back the completed ad-pod to the SSP as a single bid response, ensuring maximum revenue for the inventory and minimizing complexity/processing, time, and ensuring there is always a complete ad-pod. Leverage a standardized

impression multiplier in the request/response, and leverage the Content, Network, and Channel objects to associate ads among the duplicative requests / responses, also enabling better targeting and measurement for buyers.

Summary Matrix

Client Segment	Offering Description	Value Proposition	Key Risks
SSP	SSP acts as a pass through to BSW where the demand is fetched, auction held and full ad-pod is assembled and then returned to the SSP for insertion (SSAI) into the inventory (either pre, mid or post roll)	Increased revenue (20% more on CTV and Audio) and scaled monetization of inventory	Because SSPs already host the auction, developing this functionality for large SSPs may not be a heavy lift. Magnite does this today. If we move quickly we should be able to head this off for many.
DSP	Additional inventory	Additional CTV inventory access	N/A
Brand	Reporting API	Unified reporting for attribution	Adoption

Example

An ad-pod has possibility for 90 seconds of creative

- Instead of taking the seemingly highest value bidding and running 75 seconds of a single creative with a \$30CPM and leaving 15 seconds of dead inventory leading to a bad user experience,
- Take 3 30 second creatives each with a \$10 CPM (or more) this ensures a complete ad-pod and better user experience while ensuring revenue remains constant or increases over normal CTV trading,

Concerns

- Latency
- Adoption
- Duplication of requests/additional processing (operational overhead)
- Removes portions of auction hosting from SSP unless the SSP can break the ad-pod to take what they want the fully assembled ad-pod would be passed via SSAI
- Creative approval certification across all inventory sources to ensure what is assembled into the pod is authorized to run.
- Brand safety rules within the pod would have to be created/honored on IPONWEB side.

Investment Gaps and Owners

Status	BSW
Have / Delivered	This functionality was delivered for DAX for Audio
Planned / In Development	
Need and not planned for development	

**High Level Commercial Model**

Client Segment	Billing / revenue model
SSPs	[REDACTED]
DSPs	[REDACTED]
Brand	[REDACTED]

Estimated LEO

[REDACTED]

Addressable TAM

[REDACTED]

High Level Competitive Analysis

While some major SSPs support ad-podding for CTV trading, it hasn't seen mass adoption in a standard format yet given the customized method that had existed to execution previously, with the standardization of ad-pods in 2.6 SSPs may just build a solution themselves, but this does not guarantee they won't still have a high percent of broken or incomplete ad-pods. Much like BSW in normal display trading we are likely to see continued usage by long tail SSPs and larger players, with the mid-sized entities likely to build there own solutions.

Criteo Synergy

Aligns with CTV goals but more investigation is required.

E. "LITE SWITCH" StandAlone DSP Pre-filtering/SPO and prioritization control

[Here](#) is a link to the longer doc explaining the basic behind the proposed LSW Product.

Problem: Most DSPs through their direct connections even with their SPO efforts often end up listening to the same request (Same pub, inventory, and user) 50+ times.

Solution: Use a "lite" version of S2 specifically focused on transparency of decisioning and user control around prioritization, and let DSPs use it as a Pre SPO filter to remove unwanted or less enriched inventory prior to it hitting their systems.

Context

[HERE](#) IS A SUMMARY "SCORING" OF PRODUCT CONCEPT PROPOSALS, SCORED BY THE ABG TEAM.